PRELIMINARY INFORMATION - ANSWER <u>EACH</u> OF THESE QUESTIONS IPO AND EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER <u>EACH</u> OF THESE QUESTIONS 2020 FINANCIAL DISCLOSURE STATEMENT **UNITED STATES HOUSE OF REPRESENTATIVES** Name: Bridley James in the current calendar year up through the date of filing? E. Did you hold any reportable positions during the reporting period or D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period? C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the exceeding \$1,000 during the reporting period? exchange any securities or reportable real estate in a transaction B. Did you, your spouse, or your dependent child purchase, sell, or A. Did you, your spouse, or your dependent child: **EXEMPTION** – Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or your dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics. TRUSTS - Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust that benefits you, your spouse, or dependent child? IPO - Did you purchase any shares that were allocated as a part of an Initial Public Offening during the reporting period? If you answered 'yes' to this question, please contact the Committee on Ethics for further guidence. reporting period? A PROPERTY OF THE PROPERTY OF a. Own any reportable asset that was worth more than \$1,000 at the STATUS Receive more than \$200 in unearned income from any reportable PLIT end of the reporting period? or asset during the reporting period? 2020 Annual (Due: May 17, 2021) House of Representatives Member of the U.S Sherman District: State: CA بر 0 **¥**88 **Y8** 8 ₩ Yes Z X Daytime Telephone: \times Amendment 공 공 중 폵 For Use by Members, Officers, and Employees H. Did you, your spouse, or your dependent child receive any reportable travel or reimbursements for travel totaling more than \$415 in value from a single source during the reporting period? ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES" Did any individuat or organization make a donation to charity in lieu of paying you for a speech, appearance, or article during the G. Did you, your spouse, or your dependent child receive any reportable gift(s) totaling more than \$415 in value from a single E. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar source during the reporting period? year up through the date of filing? eporting period? Employee Officer or Employing Office: Date of Termination; Termination Tellopy in the best and the celebrates A \$200 Henalty Shall be assessed against any liadvidual who files more from an analysis of the state of the s 2021 AUG 1 (Pringa Usia USiniy) DELIVERED HAND Shared Staff Filer Type: (If Applicable) Yes 8 **8 ¥**88 ¥**9**9 8 훓 Principal Assistant š 공 **Z** Š 중 중 3 Page 1 of <u>30</u> X \boxtimes \boxtimes \mathcal{X}

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	Identify (a) each asset held for investment or indicate value of asset at close of the reporting period. If you use a production of income and with a fair market value valuation method other than fair market value, please specify the method axcessing \$1,000 at the end of the reporting period, used.	BLOCK A Assets and/or income Sources
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Page 4- of 31

Los Angelos, CA

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Name: Bradley James Sherman
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Name: Bradley Japres Sterrum Page

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Namo: Brodley James Sterman

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		ſ		see attached schedule of transactions	Grempt Bd	Vangourd CA Intend Tax	see attached schedule of transaction	Nonguard Tips Fund IRA		transaction	see attached schedule of		Vanguard Tips fund sersonal	SP Emiraphe Maga Corp. Stock	SP,OC, IT Asset	Gephas Geins: in a select transaction returning in a capital gain in excess or surv., check the "capital gains" box, unless it was an asset in a tox-deferred account, and disclose the capital gain income on Schedule A. *Column K is for easets sciety held by your shouses or dependent child.	purchase or sale of your personal residence, or repensation canners, or as purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, pieces choose "partiel sale" as the type of transaction.	reputing period in any accounty or new property treat by you, you appeared, or you dependent child for presentment or the production of income, include transactions that destinated in a capital loss. Provide a brief description of an exchange transaction.	Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the
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SCHEDULE C - EARNED INCOME

Name: Bradley James Sherman Page 24 of 30

List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. government) totaling \$200 or more during the reporting period. For a spouse, list the source and amount of any honoraria; list only the source for other spouse earned income exceeding \$1,000. See examples below.

EXCLUDE: Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act.

INCOME INTO and DRONIBITED INCOME. The 2020 limit on mensated at or above the "serior staff" rate was \$28.845. The 2021 limit is \$29.595.

INCOME LIMITS and PROHIBITED INCOME: The 2020 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$28,845. The 2021 limit is \$29,595, in addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited.	lat or above the "senior staff" rate was \$; relationship) are totally prohibited.	28,845. The 2021 limit is \$29,595.
Source (include date of receipt for honoraria)	Type	Amount
	Approved Teaching Fee	\$8,000
EXEMPLES: Coult War Roundtable (Oct 2) Ontario County Beard of Education	Spouse Selety	81 000 N/A
United States Government	\	not required
CA Legislators Retirement System Income shown net of		\$19.302
tax deductions		•
	,	

SCHEDULE D - LIABILITIES

Name: Bradley James Sterman Page 25 or 30

Report liabilities of over \$10,000 owed to any one creditor *at any time* during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting period. Members: Members are required to report all liabilities secured by real property including mortgages on their personal residence. Exclude: Any mortgage on your personal residence (unless you are personally liable); and liabilities of a business in which you own an interest (unless you are personally liable); and liabilities are personally liabilities. owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. *Column K is for illabilities held solely by your spouse or dependent child.

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Raybum Building	Congressional Federal Credit Union 9/16		Sandy Spring Bank (MD)	First Bank of Wilmington, DE	Creditor		
			1/17	5/20	Llability Incurred MO/YR		
in DC	first mortgage onhone	science by Wash. DCHore	Home Equity Line of ordit	Mortgage on Rental Property, Dover, DE	Type of Liability		
					\$10,001- \$15,000	>	
					\$15,001- \$50,000		
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			X	*	\$100,001- \$250,000	0	
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					\$25,000,001- \$50,000,000	_	
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					Over \$1,000,000* (Spouse/DC	~	

SCHEDULE E - POSITIONS

Report all positions, compensated or uncompensated, held during the current or prior calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature.

Position Name			
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Name of Organization			:
e of Organization			
			:

SCHEDULE F - AGREEMENTS

Name: Brodley James Sherman Page 26 of 30

employment; a leave of absence during the period of government service; sarticipation in an employee welfare or benefit plan maintained by a former	identify the date, parties to, and general terms of any agreement or arrangement that you have with respect to: future employme continuation or deferral of payments by a former or current employer other than the U.S. government; or continuing participation employer.
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displayer.		
Date	Parties to Agreement	Terms of Agreement
11/2014	11/2014 myself and the State of California	participation in CA State Legislates Retirement pension

SCHEDULE G - GIFTS

Report the source (by name), a brief description, and the value of all gifts totaling more than \$415 received by you, your spouse, or your dependent child from any source during the year. Exclude: Gifts from relatives, gifts of personal hospitality from an individual (which may not include a registered lobbyist or foreign agent), local meals, and gifts to a spouse or dependent child that are totally independent of his or her relationship to you. Gifts with a value of \$168 or less need not be added towards the \$415 disclosure threshold. Note: The gift rule (House Rule 25, clause 5) prohibits acceptance of gifts except as specifically provided in the rule and some gifts require prior approval of the Committee on Ethics.

	Source	Description	Value
Example:	Mr. Joseph Smith, Arlington, VA	Silver Platter (prior determination of personal friendship received from the Committee on Ethics)	\$500
	N/A	N/A	NA

Schedule of Transactions

Vanguard California Intermediate Tax-Exempt Bond Fund

Sale \$4,282.08 Sale \$15,780.48 Income Dividend Reinvested \$234.94 Income Dividend Reinvested \$10,000.00 Income Dividend Reinvested \$201.30 Income Dividend Reinvested \$188.63 Income Dividend Reinvested \$189.07 Income Dividend Reinvested \$189.07 Income Dividend Reinvested \$189.07 Income Dividend Reinvested \$1,000.00 Income Dividend Reinvested \$1,45.57 Income Dividend Reinvested \$140.00 Income Dividend Reinvested \$138.07 \$138.07 \$2,755.74
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Income Dividend Reinvested \$303.70
Sale \$20,000.00
Sale \$15,000.00
Income Dividend Reinvested \$312.97
Income Dividend Reinvested \$335.16
Transaction Amount

Vanguard TIPS Fund (IRA)

03/31/2020 Income Dividend Reinvested	
	Reinvested \$440.53
Total	\$2,238.73

Vanguard TIPS Fund (Not IRA)

Net Loss	Total Sales	Total Purchases	12/22/2020	11/12/2020	09/30/2020	03/31/2020	03/17/2020	Date
			Income Dividend Reinvested	Sale	Income Dividend Reinvested	Income Dividend Reinvested	Sale	Transaction
\$96.54	\$13,869.00	\$358.22	\$268.89	\$3,869	\$78.74	\$10.59	\$10,000	Amount
				\$286.11			(\$382.65)	Gain (Loss)

Number	Section/Schedule	Footnote
1	General Information	Filer owns a home in his district. Because that home is not subject to a mortgage, and does not produce rental income, it is not listed in this report.
2	General Information	We have been advised that the phrase "trust benefiting you" does not apply to a trust from which the filer receives no benefits, but which will provide a benefit at some future time upon the death of the current beneficiary (but only if the trust happened to still have assets at that time).
3	General Information	Disclosure not required by law or regulations: filer's campaign committee has made significant investments, including in US government bonds (TIPS) and Bank Certificates of Deposit.
4	General Information	Filer serves as trustee of Trust established by his parents and grandparents and as executor of his mother's estate. These positions are uncompensated and therefore not disclosed.
5	General Information	Non-interest-bearing loans to family members are not listed.
8	General Information	Two burial plots owned by filer are not listed.
7	General Information	Assets of the Lane M. Sherman Trust distributable in full to other beneficiaries, and as to which the filer or his children or spouse will receive no portion thereof, are not listed.
co	Schedule A	Lane M. Sherman Family Trust is a trust in which filer's mother had been sole beneficiary until her death on October, 11 2020. The filer is the 100% beneficial owner of certain certificates of deposit listed on schedule A under that trust as fully distributable to filer. He has a fractional interest in the other assets listed under the trust of approximately one-third. The valuation of those assets in this financial disclosure report reflects the value of that one-third fractional interest only.
9	Schedule A	The Bank of America account appearing on page 14 was a payable on death account with filer as beneficiary and was distributed to filer upon death of his mother, who was the primary owner.

Date listed for agreement regarding state legislative pension is the date filer first received disbursement of benefit. Filer began accruing benefit when he took office on State Board of Equalization in January of 1991	Schedule F	13
beneficial owner. Assets in this trust were distributed outright to the filer in early 2021.		
had been sole beneficiary until her death, when the filer became sole		
The Sarah Sherman-Scharf Trust was a trust in which the filer's mother	Schedule A	12
beneficiary.		
been sole beneficiary until her death, when the filer became sole		
The Margaret Moss Living Trust is a trust in which the filer's mother had	Schedule A	11
beneficiary until her death, when the filer became sole beneficiary.		
December 31, 2020, in trust which the filer's mother had been sole		
The assets listed under the Maurice Sherman trust were held, as of	Schedule A	10